

Position Management Training

November 2018



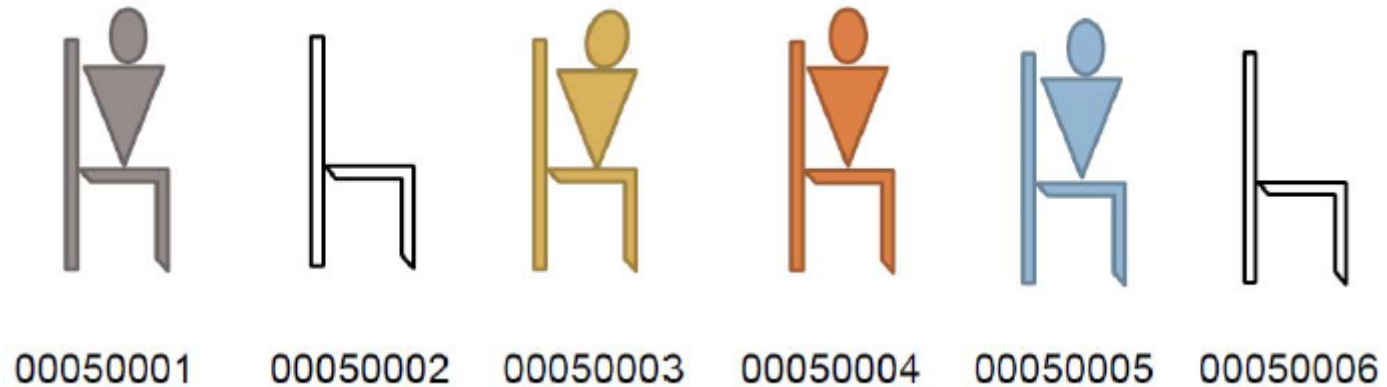
CI Budget & Planning - Presenters

- Jennifer Moss
 - Manager, Budget & Planning
- Terrie Cilley
 - Budget Analyst

Objectives

- 1) Understand Position Management
- 2) Review the Position Management Action Form
- 3) Answer end user questions
- 4) Solicit feedback

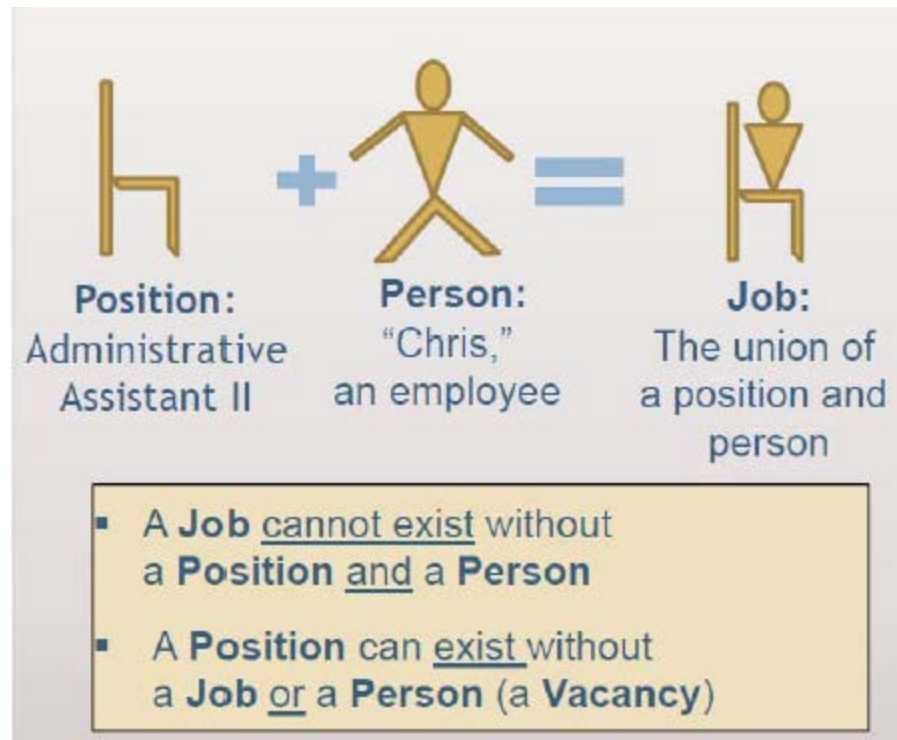
What is Position Management?



- Position Management tracks **POSITIONS** by assigning them **POSITION NUMBERS**
- A person holding a position is an incumbent

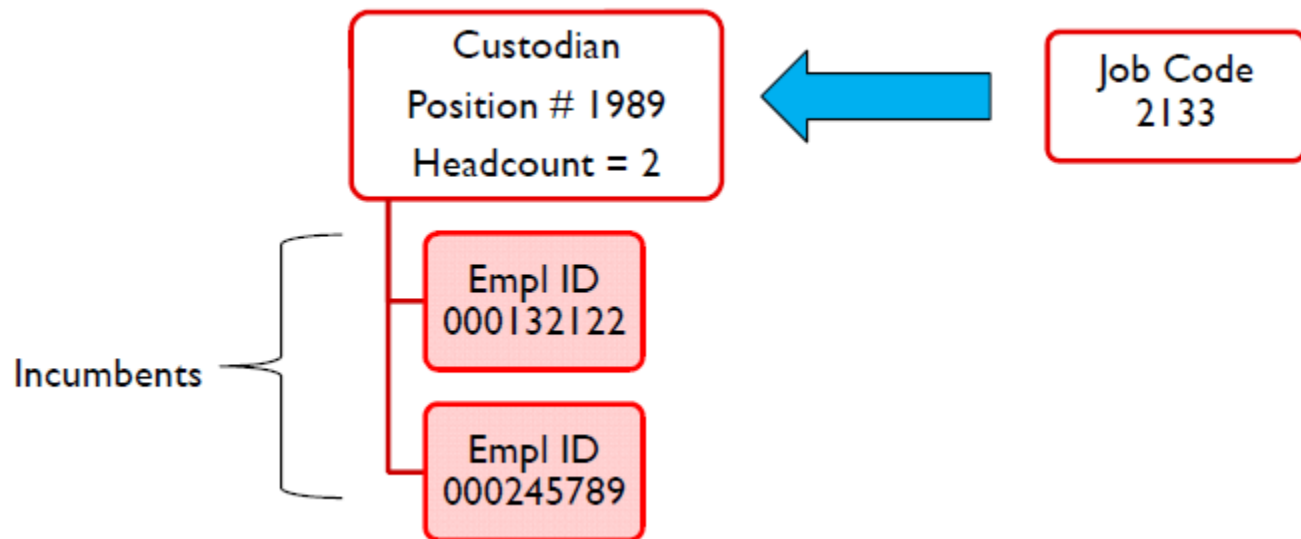
What is Position Management?

- With Position Management, a JOB is a union of the PERSON and a POSITION



Position Management – Headcount?

- A POSITION can have multiple incumbents
- A positions HEADCOUNT indicates the planned maximum number of incumbents for a POSITION



Headcount – Single Incumbent

- Normally, only one (1) POSITION is created for each appointment
- A unique POSITION NUMBER is required for:
 - All MPP positions
 - Most staff positions
 - All staff and faculty funded from multiple accounts (split level funding)

Headcount – Pooled Position

- Exceptions where multiple head count positions are created:
 - Tenure Track faculty positions
 - Temporary lecturer positions
 - Student / Work-Study positions
 - Some staff positions (job codes 2322, 2323, 2356, 2357, 2362, 2363, 2365, 2457, 4660)



Position Management Action Form



POSITION MANAGEMENT ACTION FORM Budget & Planning

CONTACT INFORMATION

Requestor: _____ Requestor's Extension: _____

POSITION NUMBER

EFFECTIVE DATE

POSITION ACTION

New Position Update Data Position Reclassification In-Range/ In-Class Progression Title Change

Working Title: _____ Job Code: _____ Grade/Range: _____

Home Department #: _____ Reporting Unit #: _____ Reports to Position #: _____

Time Base (1.0 for full-time, 0.5 for half-time, etc.): _____

Fund Description: General Fund Trust Parking Housing Extended Univ
 Lottery Student Health Other Reimbursed Activities

Position Status: Regular Position Full-Time Single Incumbent
 Temporary Position Part-Time Pooled Position (Head Count: _____)

Position End Date (if Temporary): _____

FUNDING / DISTRIBUTION ACTION

Provide information in the following table to identify the accounting string from which the position should be paid. All positions are set at position level funding. Appointment level funding applies to pooled positions in which the fund is different than the default position level funding. Use the template on the second page to dictate appointment level funding.

Fund	Department	Program	Class	Project	Distribution %

Funding End Date (if Temporary): _____

Position Management Action Form

- A Position Management Action Form (PMAF) is the means to create or modify POSITION data
 - PMAFs are submitted electronically via DocuSign
 - <https://www.csuci.edu/vpbfa/docuSign/>

Position Management Action Form

- Creating New Positions or Backfilling Existing Positions
 - A Position Management Action Form (PMAF) is needed for a:
 - Vacancy
 - New TEMP position

NOTE: New, REGULAR positions are only approved through the yearly budget process

Position Management Action Form

- Updating Existing Positions
 - A Position Management Action Form (PMAF) is needed for a change in:
 - Job Code
 - Grade/Range
 - Time base
 - Home Dept ID #
 - Unit #
 - Working Title
 - Reports to Position #
 - Funding (Distribution of Labor Cost)

Position Management Action Form

- General Guidelines
 - The effective date for a position action is generally the first day of the current month (however in some situations, a retroactive date is necessary)
 - Submit PMAFs by the 25th of the month for actions to be active in the month submitted

Position Management Action Form

If you encounter an error...

ACTION:

Complete a
Payroll
Expenditure
Transfer Form



OUTCOME:

Changes the
accounting
string and/or
% distribution



IMPACT:

If one time
error, no
further action
needed

If permanent
change, must
complete a
PMAF

Demonstrations

- 1) Position Management Action Form
- 2) Payroll Expenditure Transfer Form
- 3) Funding Summary USA Report in CI Records
- 4) LCD Dashboard (access for authorized users only)

Questions / Feedback

- Budget & Planning website:
<http://www.csuci.edu/budget/>
- Jennifer Moss
x3510
jennifer.moss@csuci.edu
- Terrie Cilley
x3245
theresa.cilley@csuci.edu